

# Configuring Views

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Views determine the way records are displayed within a table, such as the fields that are displayed, row ordering and colors, layout, and the number of records per page. Views allow individuals and teams to have their own settings for the same table.

## Planning and Managing Views

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Every table should have at least two views: a default view with the key facts for that table's records, and another view with more detail and more fields. Tables also always have four **Default Views**: Personal Grid, Personal Split, Mobile, and Summary.

If you embed the table in the records of other tables, you should also design a view specifically for that use to remove repetitive information. For example, in the default view for the People table, it makes sense to show the Company field, but if you embed the People table in a Company record, the Company field would show the same value for each record. Instead, create an additional view in the People table that does not include the Company field.

Admins can create views and apply them to teams of users, making them available in the drop-down or the default view for that table. See [Views and Permissions](#) for more information.



Saved searches can be configured to apply a specified view when the search runs. This is particularly useful with hierarchical data, as different subtables often have different optimal views of relevant fields. For more information, see [Using Saved Searches to Work Efficiently](#).

## Creating and Editing Views

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To create or edit a view:

1. From a table's action bar, click Views.
2. Choose whether you want to create a new view or configure existing views:
  - Select New to create a new view.
  - Select Edit to edit the current view.
  - Select Manage to display all the existing views you can edit for the table. Then, click the edit icon for the view you want to edit.

## General Tab

On the General tab, set the basic settings for a new view.



When you edit a view, the wizard opens at the Fields tab. In most cases, you don't need to edit the settings on the General tab, but you can click Back or click the General tab to review or edit these settings.

1. Enter a name for the view.
2. Select Grid View or Split View. Split view enables the preview pane, where you can review the full record form on one side of the screen while the table view is still visible on the other. You can also edit records in the preview pane.
3. Set whether the record can be deleted.
4. Define a maximum and minimum view width, as well as a minimum field width. For these, we recommend:
  - Set a Maximum View Width of at least 100 to 120. The best choice depends on the fields in your view and the number of characters in those fields.
  - Set the Minimum View Width to Same as Action Bar. When this is set to None, the view is only as wide as the data being displayed, which can sometimes look too narrow.
5. Choose how many records to display per page. If pages take too long to load, consider lowering this value. A reasonable starting number is 30 records per page.
6. Select whether cell borders are displayed.

## Fields Tab

Use the the Fields tab to configure field and record display options.

1. Select whether the selection checkboxes and different icons are displayed. Generally, you should at least include an edit icon.
2. Choose whether you want the view to show related records as a tree of hierarchical relations. This is useful for embedded tables so that a record's parent, children, and siblings are obvious to the user.

Edit	ID ↓	Contract Title	Status	Company Name
	575	 Ranyor-Collins Master Services Agreement	4 Active	Ranyor-Collins
	577	 Raynor-Collins Statement of Work 1	1 Active	Ranyor-Collins
	580	 Ranyor-Collins Amendment 1 to Statement of Work 1	Draft	Ranyor-Collins

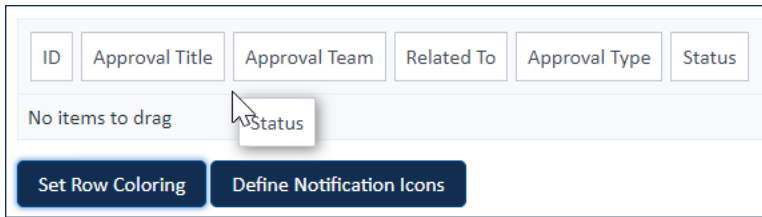
- a. Select the field that stores the ID of the record's parent and establishes the parent-child relationship. For example, Parent Contract ID.
- b. Select the field that should show the plus and minus icons, and nest to indicate hierarchical relationships. In the example above, this is configured as Contract Title, so the title is where the icons appear and where the text is indented.

- c. Choose how many records you want to show at a single level. If there are more records at a single level than the number you choose here, the list includes a Load More button at the end of the list. This setting can impact performance if you have many records on each level of the hierarchy.
  - d. Choose whether to preserve the expanded branches of the tree when you return from a record, or to load only a segment of the branches based on where you were working. The latter is useful if your data structure involves a lot of very large trees that impact performance. If you load only a segment of the branches, you can click Load Previous as well as Load More to show more of the tree.
  - e. Choose whether searching and filtering expands only the first tree to show search results, or expands all trees. Note that both settings expand the tree only to the first search result.
3. Select the maximum lines to display per record and per linked field. For a clean look, this should be set to 3 or fewer lines.
4. For each field you want to include in the view:
- a. Select the Display checkbox so it shows in the view. Only display relevant fields; showing too many can make the list slow to load, while showing too few can slow down user productivity.
  - b. Set the Column Width and Column Width Size, if desired. Users can adjust the Column Width by clicking and dragging the column borders in the table view. In most cases, you should select Automatic, but for Date/Time fields, set the width to 14 to force the data to wrap onto two lines.
  - c. Add a Cell Link, if desired. To save space, you can show the ID field and set the Cell Link field to View instead of showing a view icon. This is also useful for views used in reports, so users can jump from the report directly to the record.
  - d. Select the [Quick Edit](#) checkbox if you want users to be able to edit the field directly from the table view. This is only available if the field is configured to allow it, and if your group permissions allow you to create Quick Edit views.
  - e. Select the [Quick Search](#) checkbox if you want the field to appear as a default option when users click Search from the table view. Adding a field to Quick Search makes it easier for users to filter records based on that field. Note that this is not available for fields that are present only in subtables.
  - f. Select Right Align for fields whose content should be formatted this way. This is typically only used for currency.

## Order/Colors Tab

Use the Order/Colors tab to select the order in which fields are displayed, as well as the row coloring and notification icons. Users can adjust the column order by dragging and dropping if they need to, but it won't overwrite the default order defined here.

1. Drag and drop fields into the left-right order you want. If you are editing an existing view, newly added fields appear to the far right. In general, always place the ID field in the leftmost position, and continue from there placing the most relevant fields to the left of less relevant fields.



Drag to reorder columns

2. If you have a lengthy text field that you want to show across the full width of the screen, drag the field name down to the "No items to drag" area. The content of a field in this position is shown without a field label. In most cases, try to keep record information on a single row to improve readability.
3. If you want to apply color coding to records based on field values, click Set Row Coloring. Row colors provide a visual aid to easily identify specific record attributes, such as contracts that have expired or tasks that have passed their due dates. We recommend only creating one or two row color filters, to avoid visually overwhelming users.
  - a. On the Field tab in the Set Row Coloring window, select the Choice field that will serve as the trigger for the row coloring.
  - b. On the Colors tab, change the text size, font, color, and background color for each value of the choice field.
  - c. Click Finish.
4. If you want to add notification icons based on field values, click Define Notification Icons. Notification icons are another option for providing a visual aid to users, so they can easily identify specific record attributes, such as status.
  - a. On the Field tab in the Define Notification Icons window, select one or more Choice fields from the list.
  - b. On the Icons tab, select the icon to associate with the values in each field you selected. You can also assign Alt Text for each. You can associate an icon with one value, several of the values, or all of the values. The system comes with many icons to choose from, but you can also upload your own icons.
  - c. Click Finish.
  - d. If you haven't already, in the View wizard, return to the Fields tab and select the Show Icon Column checkbox so that your notification icons are shown in the view.

## Apply Tab

Use the Apply tab to choose to which teams have access to the view. This tab is only visible if you have permission to publish views to other users.

1. Choose whether to keep or change the current visibility settings for the view. If you choose to change them, you must also choose whether the view is available to yourself, which teams can see the view, and whether subteams and new teams can see the view.
2. Choose whether to keep or change the settings for which teams have the view as a default. If you choose to change them, choose whether the view is the default for yourself, which teams have the view as a default, and whether subteams and new teams have the view as a default.
3. Click Finish.



Team membership affects default and available views:

- A user on multiple teams can see all views that are available to any of their teams.
- A user's default view is the default assigned to their primary team. A team has only one default view.
- The user's personal view is their primary team's default view until the user customizes their personal view.

## Table View Popovers

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In the table view, you can configure popovers that allow users to easily see a little more information about a record without going into the record form.

## Summary Popover

To offer users a quick notecard version of the record, configure a Summary layout for the table, then edit the view and select the checkbox to Show Edit Popover icon or Show View Popover icon.

You can use the summary layout to show more detail about the record than the table view shows, without requiring the user to open the full record. This can be useful for data entry, reassignments, short working notes, related tables which can't be shown in the table view, and much more. It can also make workflows smoother where users would otherwise use multiple Quick Edit fields in the table view.

EditClose⋮

Current Clause Text

Noncompetition.

Current Markup

Show Full Record

Example summary layout used in Contract Clauses when shown in the related table in Contracts

To set up a Summary layout:

1. Select Summary from the drop-down above the field list.
2. Drag fields from the Available Fields pool onto the Header, Body, and Details tabs. In the popover, these sections appear together. In the example shown above, the service request ID is the only item in the Header tab, and the rest of the fields are added to the Body tab. Choose fields carefully, as popovers are small and it's easy to make them look cluttered. You can also make use of visibility-dependent fields to avoid clutter in popovers.

✔ Use the Preview button to see how your Summary layout will look.

When you've created a Summary layout, you need to add the popover to a table view.

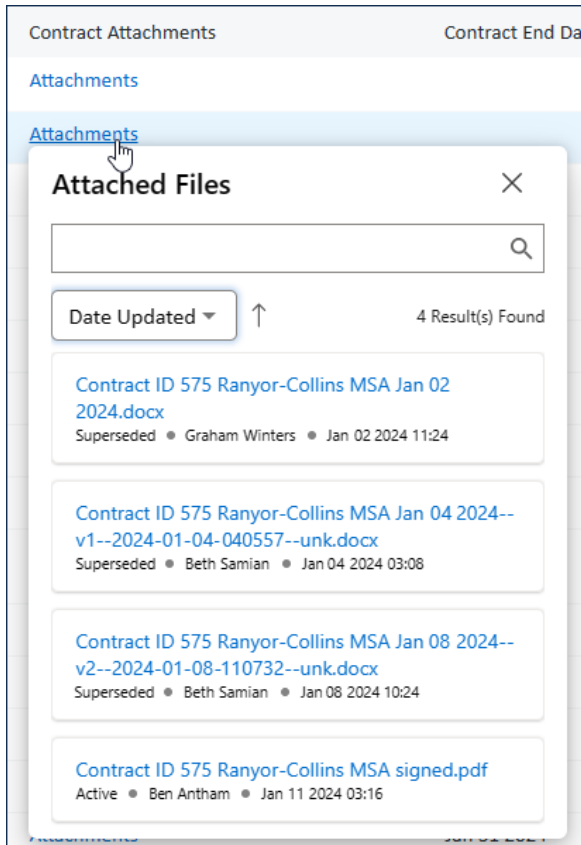
1. Go to the table where you configured the Summary layout.
2. Select the appropriate view and click Edit in the Views drop-down menu.
3. Locate the field you want to use to open the popover and make sure the Display check box is selected.
4. In the Cell Link drop-down menu, select Edit Popover or View Popover.
5. Click Finish.

✔ If you prefer, you can show the Edit Popover or View Popover options in their own columns as icons using the check boxes at the top of the View editor. If you choose this method, make sure to configure icons for the popovers in the Icons tab of the Look and Feel wizard.

## Insight Popover

Use an insight popover to easily show a record's linked contents directly in the main table view, without opening up the record first. For example, check a contract's attachments or related contracts at a glance.

Insight popovers are available for related tables, embedded search results, and linked fields that are configured to display as an embedded table.



Example insight popover showing attached files as an overlay window from the table view, with each attachment listed along with its status, last editor, and last update date

To configure an insight popover:

1. Go to Setup [Table] > Fields and edit the field.
2. Go to the Display tab and scroll down to Insight Popover.
3. Select the Enable checkbox.
4. In Cell Label, choose text or an icon to show in the table view, which the user will click to open the popover. In the example above, this is set to Text labeled Attachments.
5. Enter the text heading to show at the top of the popover. In the example above, this is Attached Files.
6. Select the field to show in the popup. Here, you can select any field that is part of the linked relationship, and any field that is present in the table you're working in. In the example above, this is the Attached File field in the Contract table.
7. In the Additional Fields section, select up to three fields to include for each item in the popover. In the example above, the Status, Created By, and Date Updated fields are selected. These fields can also be used to sort the results, using the drop-down beneath the search bar.
8. Set a maximum result size to limit the number of items that are pulled into the popover. To avoid performance impacts, it's best to avoid entering a value higher than 30.

# Troubleshooting

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If you notice table borders disappearing or reappearing, your system might have a conflict between a setting in the current view and a setting in the Look and Feel scheme. If you see borders but the view doesn't have borders applied, or if you don't see borders but the view does have borders applied, check the following setting:

1. Go to **Setup > Look and Feel**.
2. Click Power User Interface or End User Schemes to resolve the issue in the corresponding interface.
3. Edit the look and feel scheme that is applied to the users experiencing the issue.
4. On the Tables tab, check the settings under Table Border and Cells. The Table View Borders Visibility setting can override settings for all views.